

Process Fun: The Ultimate Integration of Policies and Procedures

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Published In/Presented At

Dinbokowitz, J. (2105, April 23). *Process Fun: The Ultimate Integration of Policies and Procedures*. Poster presented at: The American Nursing Informatics Association Annual Conference "Declaration of Nursing Informatics"

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Process Fun: The Ultimate Integration of Policies and Procedures

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- How much valuable time is wasted by nurses trying to locate a specific policy?
- Why isn't there an easier way to find a policy?
- Is staff accessing the most current policy?

BACKGROUND

Healthcare organizations face increasing challenges to keep the multitude of policies and procedures current and readily available to staff. Common central repositories include SharePoint or local intranet sites which are cumbersome and do not provide robust support for the ever increasing complexity of an organization's documentation.

GOAL

Successfully implement a document management system to efficiently manage policies and procedures. The system will standardize the creation and review of policies and reduce the time it takes to write, review, approve, distribute and locate policies.

PROCESS

Vendor selection based on ease of use, site visits, and ongoing support:

- Documentation located in one place
- Easy access with "one click" of icon
- Search engine locates policies using keywords
- Automatic archiving of old policies
- Standardizes review, edit, publishing, distribution, and attestation
- Automatic email reminders to reviewers, approvers, and staff
- Track policies to ensure regulatory compliance and review
- Integrates policies in electronic health medical record (EHMR)

ROLE OF INFORMATICS NURSE

- Provide leadership for implementation process
- Understand scope of project
- Become familiar with configuration of software
- Create user friendly training materials
- Fast track departments to stay on timeline

CHALLENGES

- Engaging document owners to manage workflow is paramount
- Initial upload of policies with standard header and footer for consistency
- Collaborating with IS to implement single sign-on access, firewall access, and download of HR employee file to vendor server
- Assigning accountability for review and approval processes

SUCCESSFUL OUTCOMES



- Nursing Informatics Department ensures a smooth transition for staff.
- Training materials standardized for all departments.
- Initial rollout included three departments. Over 15 departments, including outpatient facilities now accessing new site.

NEXT STEPS

- Scope of project increased when other departments became aware of the new system
- Continue to transition departments from the intranet site to the new document management system
- Ongoing technical support as rollout continues
- Provide education to new employees and new reviewers/approvers of policies
- Utilize report functions to track policies in review or approval stages
- Expand to include clinical practice guidelines and meeting minutes

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